DC Main Street
Partners and Places Database

Part I: Getting Started and Guidance Document

Updated 1 September 2005

This document was adapted primarily from the help files included in the FileMaker Pro template produced by Allston Village Main Streets (AVMS). AVMS volunteer Paula Cobb and Executive Director Jennifer Rose designed and built this database and wrote the original help files. This document was adapted for *re*STORE DC/DC Main Streets. Comments on this document should be forwarded to Steven Stichter (Steven.Stichter@dc.gov | 202 478 1336).

***re*STORE DC** supports revitalization of neighborhood business districts and small businesses in the District of Columbia through the organization, design, promotion, and economic restructuring of commercial areas.

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DC Main Street *Partners and Places Database*

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Getting Started

This database was created for use by a Main Streets program to organize contact information about business owners and property owners, and link this information to parcel information from the local government. It also allows one to experiment with different assessment formulas and show the resulting assessment per parcel or per owner, for use in developing and managing a business improvement district (BID).

This document should assist you in becoming familiar with the database. It explains step-by-step how to import your data and link it within the database, and then how to determine assessments. We assume, though, that you have some basic knowledge of how to operate FileMaker already—if you haven't ever used FileMaker before, then try going through one of the tutorials that came with the program before going further. (But take heart—as database programs go, FileMaker is quite easy to learn.)

Overall organization and tips

The database is organized into four related FileMaker database files. The first database file is named Contacts, and contains all information about people and businesses. The second database is named Parcels, and contains all information about properties. The third database is called Zoning and contains an index of zoning codes and what they mean. The fourth database is called NAICS codes[1] and contains an index of codes and definitions. DO NOT CHANGE THE FILE NAMES or scripts will not work.

In general, you should work in "browse" mode. Calculation fields or option fields that you need to enter something into are marked in yellow in the database forms. Fields that are actually references from another file are marked in blue.

Opening the database

1. Start FileMaker Pro
2. Select 'File/Open' from the menu
3. Navigate to the folder containing the database files
4. Open either the 'contacts' or 'parcels' file—all related files will open automatically

Recommendations for backing up the Partners and Places Database

For all critical computer and paper files, it is important to have—and implement—a system for making and keeping backup or archival copies for safekeeping of these documents. As the central repository for contact, business and parcel information for your Main Street program, the *Partners and Places Database* should be considered one of these 'critical' files to be backed up regularly.

The appropriate schedule for backing up this database (as for other files) depends upon the frequency with which changes are made. Since it is difficult to remember incremental changes that are made to the database, however, **it is recommended that the database be backed up to a safe location (another computer or a diskette/CD, preferably kept off-site) at least once a week.**

This database was developed in FileMaker Pro. It is important to note that FileMaker saves changes as they are made to the database. This feature is beneficial in ensuring that changes entered into the database will not be lost inadvertently. However, FileMaker does not have an 'undo' command to undo changes once they have been made to a record. Consequently, the database should be backed up to another file name or location prior to making any large-scale changes to the database, including activities such as importing new records, making global find-and-replace changes to the database or deleting groups of records. Backup copies of the database made for this purpose can be deleted once you have confirmed that the actions that you took were successfully completed.

[1] North American Industry Classification System, the successor to SIC Codes. More information is available at www.census.gov/epcd/www/naics.html

Instructions for backup

The *Partners and Places Database* comprises a set of linked FileMaker Pro database files. These files are located together in the same folder. To create a backup copy of the database, copy the folder and its contents to another location on the computer or to another diskette/CD. This should be done outside of the FileMaker Pro program (either from the file manager/explorer or through a backup utility). The name of the new folder should reflect that it contains a backup copy of the database and the date of the backup (e.g. 'MS_db_bkup_040615').

Tracking who enters or updates data

Both the contacts and the parcel databases track who last made entries or changes to a particular record. The 'Modified By' field in each of these databases is an 'auto-enter' field that automatically is updated with the name of the current user, whenever a record is updated.

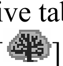
To consistently track who last made changes to a record, the current user name should be changed each time a new user begins work with the database. FileMaker Pro enters the current user name shown in the Application Preferences dialog box into the 'Modified By' field. To set the current user name, select from the 'Edit' menu 'Preferences | Application …' and choose the 'General' tab. The current user name will remain set until the next time it is changed.

Contacts Database

The Partners and Places Database was designed for use by a Main Streets program or a business improvement district to keep track of contacts—both organizations and individuals. Its companion database "Parcels" keeps track of ownership, occupancy, and tax information about properties. The two files link to create an integrated view of a business district, its businesses, properties, and those who own and operate them.

To assist you with gathering complete data for all types of contacts and businesses, it is recommended that you prepare forms for capturing the contact and business-related information that you track within the database. This can either be a customized form or a blank record from the database.

Structure of the Contacts database

The Contacts database has five main tabs which organize information, in addition to the basic contact information (i.e., name, address, phone) that appears at the top of the page no matter which tab you're viewing. The five tabs are: Business, Affiliation, Events, Facade, Properties. Each is summarized below. See the Layout Tree [] for a chart of all layouts and functions.

Business. Organizes information about businesses in your district. This tab contains fields in which to describe the type of business, characteristics about the physical location (e.g. rent, square feet, a link to the landlord), and information about jobs created by the business. It also has fields in which to capture business hours, and a field for comments. There is a tab to get you to the vacancy rate for the district and to the checklist on business changes and summary job statistics.

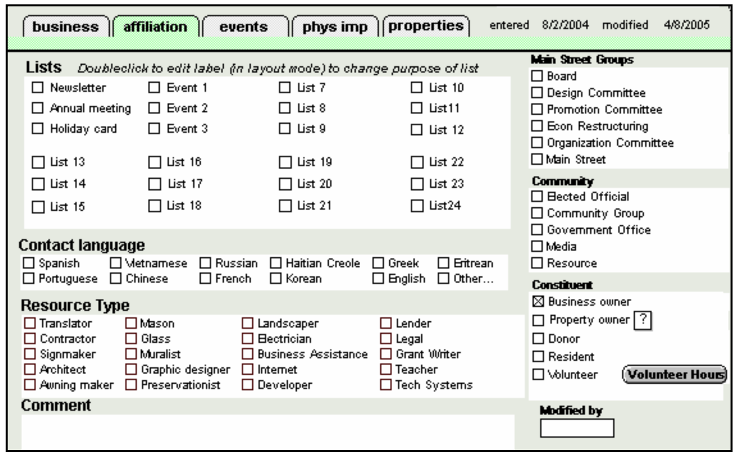
Affiliation. Organizes information about what groups or lists a given contact is associated with. On this tab, you can keep track of who's on your board and committees, who should get your newsletter, which people won door prizes at last year's event—anything you want to remember. There's also a field for keeping track of the contact language for each contact. A button connects you to the Volunteer hours layout.

Events. Organizes information related to attendance, sponsorship levels, gifts in kind, or anything else for three different events over time. When you click on the Events tab, it will automatically bring up whichever of the three events that you looked at last. You can edit the event names in Layout mode. You could also use this layout for memberships.

Physical Improvements. Organizes information on physical improvement investments and grant programs in the district. If your program operates a façade improvement program or a signs and awnings program (or any other program that disburses grants to members of the community for projects) then the 'phys imp' tab will help organize and track those projects and disbursements.

Properties. Summarizes which properties each contact owns within the district, by looking in the Parcels file. This list of properties owned by the contact is automatically updated as links are made between the owner contact and properties in the parcel database. (See "Link owner records in the Contact file with records in the Parcels file", below.)

Affiliations Tab: Tracking Contact / Business affiliations, characteristics



The 'affiliations' tab provides a wide variety of standard and customizable checkboxes and approaches for tracking a contact's affiliations, characteristics and interests. A number of these fields have specific importance within the Partners and Places database:

- *Volunteer*—field must be checked for contact to appear in volunteer hours report.
- *Property Owner*—field is automatically selected when contact is linked as owner of parcel(s) in the parcel database.
- *Business Owner*—identifies a contact as **an active business in the business district**. Field must be checked for contact to appear in business directory report.
- *Retail Space* (on Retail Space Inventory)—a retail space in the district, with a business or vacant.

The affiliations tab allows you to track a wide variety of information on contacts, their affiliation to and interests in the Main Street program through established categories and check boxes. These existing fields can be customized, based on the needs of the Main Street program. Before customizing a field, it is important to understand the two types of FileMaker check boxes that are used in the affiliations view:

- *Standard check boxes* are yes/no fields, each of which is stored in a separate field in the database. The 'Main Street Groups', 'Community' and 'Constituent' sections of this view provide static checkbox fields that correspond to standard interests and needs of Main Street programs; the 'Lists' section provides a large number of customizable checkbox fields that can be re-labeled to meet the needs of individual programs.
- *Value lists* can be displayed to appear similar to standard check boxes. These fields can store multiple entries in the same field and the text that is displayed in the layout is governed by the entries in the underlying value list. The 'Contact Language' and 'Resource Type' sections of 'affiliations' view are value list fields, not standard check boxes. See note below about changing the contents of these sections of the view.

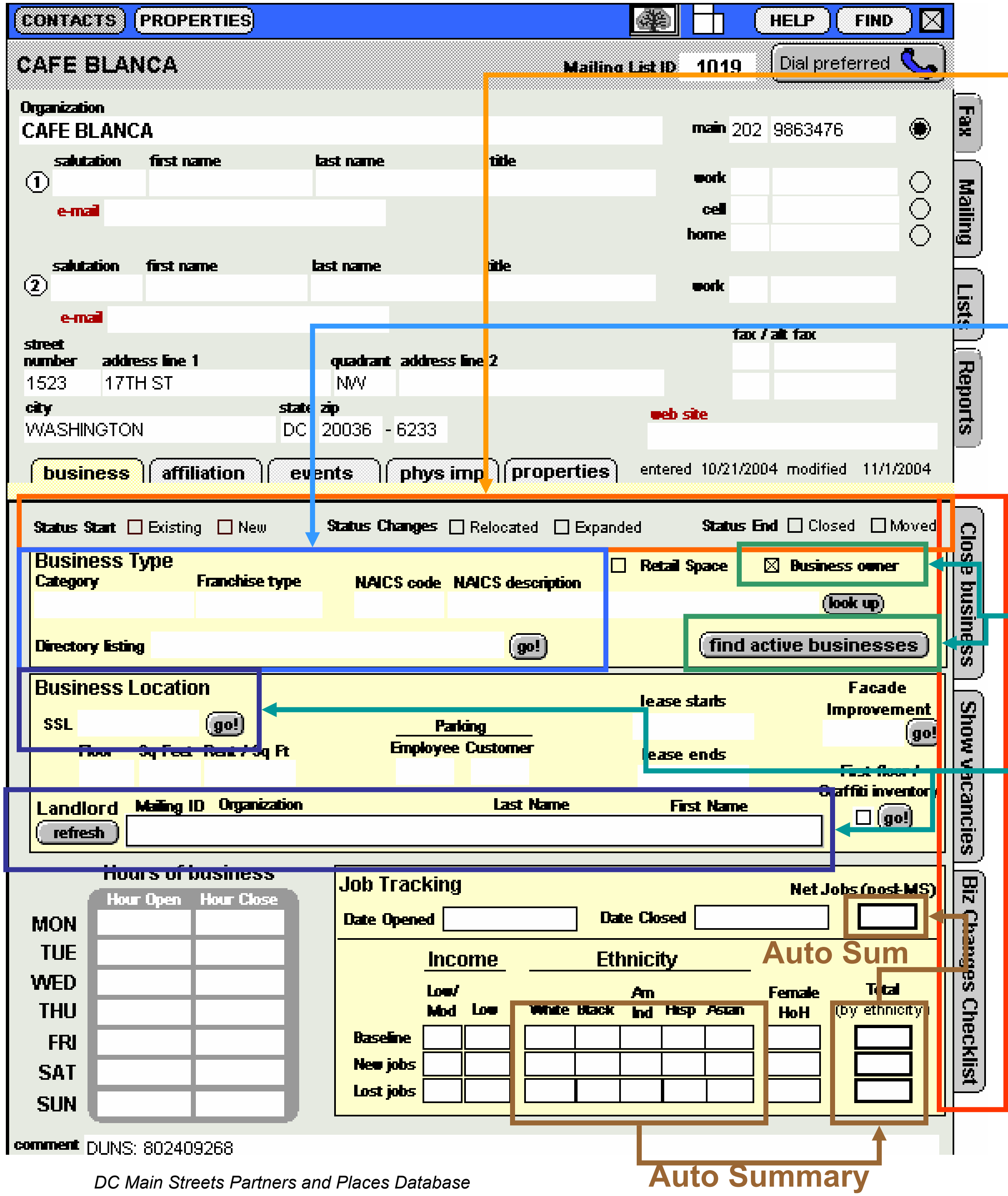
Affiliations, characteristics and interests can also be tracked by entering notes, custom codes or remarks in 'Comment' field, a free-form text field.

NOTE regarding redefining value lists: Redefining a value list item after data have been entered might cause unexpected results. For example, if you change a value list entry, the field will appear to be empty on layouts where the field is formatted as a checkbox or radio button. Also, you will not find the existing records which contain the original item name. Therefore, if you want to update the options listed under 'contact language' or 'resource type', it is recommended that you:

1. refine your list before selecting entries in this field,
2. add any later entries to the end of the value list, and
3. do not rename any value list items after data have been entered.

Business Tab: Tracking businesses in the neighborhood business district

Businesses in the Main Street district are tracked in the contact database, with the primary business-related fields are organized under the 'Business' tab of the contacts database. The 'Business' tab, with detailed descriptions of its components, is depicted below. This tab contains the following business-related fields, which can be filled in incrementally as information is collected. The only required field for business is the 'business owner' field—**the 'Business Owner' field must be checked for a contact to be treated as a Main Street business contact within the *Partners and Places Database.***



Business Status tracking – since inception of Main Street

Business Type:

- **Category: Service, Retail, Profess'l, Industrial, Other (editable list)**
- **Franchise type: Independent, Franchise, Local/Regional/National**
- **NAICS Code: Standard codes, descriptions from related file**
- **Directory listing: Categories for neighborhood business directory (list expands with category entries)**

Business Owner – marks record as an active business IN YOUR DISTRICT. 'Find active businesses' finds these records.

Business Location and Landlord – Generally matched through the Parcel database tools 'Sync with Contacts' (location) and 'Match to Biz' (landlord)

Business Task Tabs:

- **Close business—creates historical record for business and a new VACANT space entry**
- **Show vacancies—displays report of all VACANT spaces in database**
- **Biz Changes Checklist—summary report of all business status entries**

- *Business Owner (upper right corner of tab)*—identifies record as an active business in the Main Street district. This field should be checked if the record represents a business within the boundaries of your district that you wish to include in business-related tracking and reporting. You should not mark the 'business owner' field for business contacts that are not within your district (for example, if a record is for a business from which you purchase your stationary, but the business is not in your district, you should not mark that record as a 'business owner'.) Selecting the 'Find active businesses' button selects all database records that are marked as 'business owner'.

- *Status fields (top row of tab)* allow tracking of business status, relative to the establishment of the Main Street program.
    - *Status Start:* Mark 'existing' if the business pre-dated the Main Street program or 'new' for businesses that were established after the beginning of the Main Street program
    - *Status Changes:* To identify businesses that have relocated or expanded since the establishment of the Main Street program
    - *Status End:* To identify businesses that have closed or left the district.

- *Business type fields*—fields for categorizing a business
    - *Category:* An editable selection list: Service, Retail, Professional, Industrial, Other
    - *Franchise type:* Independent, Franchise, Local Chain, Regional Chain, National Chain
    - *NAICS Code:* "North American Industry Classification System," the successor to SIC ("Standard Industrial Code") classification system—used to classify the type of business.
    - *NAICS Description:* Automatically looked-up, based on the NAICS code entered.
    - *Directory Listing:* Defines categories for the neighborhood business directory. You can define your own categories for entry into this field. The selection list expands with each unique, new category entered.

- *Business Location*—SSL ('Square/Suffix/Lot'), parcel ID code of business location. This field is generally set through the 'Sync with contacts' tool in the parcel database. For more information, see 'Link business records in Contact file with parcel records in Parcels file' in the next section.

- *Business Information: Floor, Sq Feet, Rent/Sq Ft, Parking (Employee/customer), Lease (starts, ends)*— General information on the retail space and related amenities.

- *Façade improvement*—field lists any façade improvement program in which the business is participating. This information is generally entered under the 'Phys imp' tab. Selecting the 'go' button next to this field opens the 'Phys imp' tab for the current record.

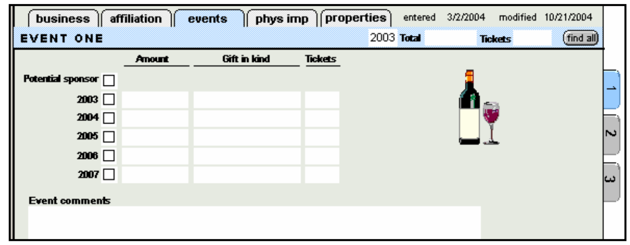
- *First floor/graffiti inventory*—identifies the business as needing graffiti abatement. Selecting the 'go' button next to this check box opens the graffiti inventory report for all businesses in the district. The specific type of graffiti abatement necessary can be indicated on this report.

- *Landlord*—the business' landlord will be listed automatically, provided that the SSL for the business has been identified ('Business location' field above) *and* a contact record has been linked to the parcel record as the owner of the parcel in the parcel database. You do not need to enter any information directly into this field.

- *Hours of business*—for recording standard opening and closing times for the business.

- *Job tracking*—for tracking jobs in the Main Street district. The 'ethnicity' fields are automatically summarized into the 'total' columns (by type: baseline, new or lost). The total column is automatically summarized in the 'Net Jobs (post-MS)' field. The opening and closing dates for a business are also noted under job tracking.
    - *Baseline:* jobs that existed when the Main Street program was established.
    - *New:* jobs created since the establishment of the Main Street program
    - *Lost:* jobs lost since the establishment of the Main Street program.

Events Tab: Tracking and Reporting Event Participants and Donors

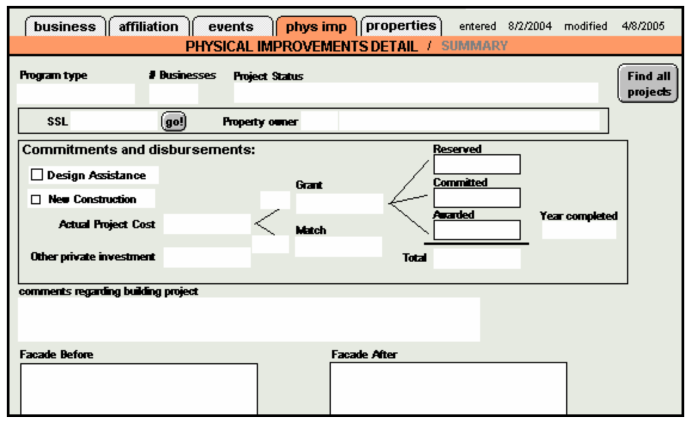


The ‘events’ view in the contacts database enables the tracking, for up to 3 events over multiple years, of 1) event sponsorship and ticket sales, 2) individual and total donations for an event, 3) participation in events.

If an individual (or business) participates in or contributes to an event, select the checkbox for the year on the page for the event in that contact’s record. Donation amounts, in-kind gifts and tickets can be entered on the same screen.

The total funds and tickets for that event for the year selected are automatically tallied. The year of interest can be changed by clicking on the year field to the left of ‘total’ in the header line. Selecting the ‘find all’ button finds all contacts that were affiliated with the event in the selected year.

Physical Improvements Tab: Tracking Façade Improvement Grants and Investments



The Physical Improvements tab allows the tracking of physical improvements—including façade upgrades, sign programs, remodeling and construction—for specific properties in the Main Street district. Through the fields on the ‘phys imp’ tab, you can track general investment in your district—including both private investments and Main Street-administered grants.

The following fields are available for tracking physical improvements in the business district:

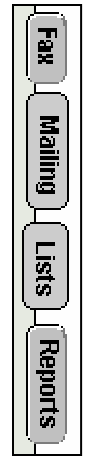
- *Program Type*—a list field for selecting the type of program under which the improvement was made or supported. The standard list includes: Sign program, Façade program, Window display program, Property acquisition and development fund, All private (no public or Main Streets funds provided), Public. This list can be customized, if needed.
- *# Businesses*—the number of businesses involved or affected by the improvement(s)
- *Project Status*—a list field for indicating project status: Design assistance requested, Design assistance completed, In progress, Completed
- *SSL*—the property ID for the parcel where improvements were made. The property owner field will be filled in automatically once the SSL has been entered.
- *Commitments and Disbursements*: The type(s) of assistance and amount of funds committed and expended are tracked through the following fields. *Note: the ‘Grant’ and ‘Match’ amounts and percents fields are automatically calculated based on the other cost fields—these fields cannot be modified.*
    - *Design Assistance*—box indicates that design assistance is promised / has been provided.
    - *New Construction*—box indicates new construction.
    - *Actual project cost*—the total project cost.
    - *Reserved / Committed / Awarded*—amounts and status of funds provided to the project through grant programs managed by the Main Street program. The total field automatically displays the sum of these three fields.
    - *Other private investment*—other funds invested that are not included in the total project cost.
    - *Year completed*—date that the improvement was completed.
    - *Comments*—for a description of the physical improvements undertaken.
    - *Façade before | Façade after*—photo fields. To include photo, select the field and choose ‘picture…’ from the ‘insert’ menu.

To see a summary of all improvements, click on “Summary” in the header. You can create a new record for projects not associated with a particular business or to represent a public project (such as a streetscape project).

Tracking Physical Improvement—Steps

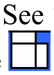
1. In the contacts database, open the 'phys impr' tab
2. Collect the following information for all properties of interest.
    a. Updated contact information
    b. Status of the work
    c. Actual project cost
    d. Date of completion, if completed.
    e. Description of improvements.
    f. Photo
3. To assist with collecting and recording information on the street, you can generate tracking forms from the Partners and Places Database: Select (find) the records for which physical improvement information is to be collected. Print the contact database pages (with 'phys impr' tab showing) for these businesses.
4. Enter into the database the information collected. Select project type for each (select 'All private' if no funds were provided by public or local Main Street funds.)
5. Identify the Parcel ID (SSL) for each record with physical improvements. Because this information is used to link to the parcel database, it must match the SSL in that database exactly. Consequently, it is recommended to find the appropriate record in the parcel database, copy the SSL and paste it into the SSL field in the physical improvements tab.
6. If funds were provided by the Main Street program, enter the grant amounts into the reserved / committed / awarded fields.

Faxes, Mailing Labels and Lists



The Partners and Places Database includes a series of pre-set layouts to enable the simple creation of fax cover sheets, mailing labels and other lists from the set of currently selected records. These layouts are accessible through the tabs to the right of the top section of the contacts database form. The following options are available:

- *Fax*—produces a fax coversheet for each of the currently selected records (one cover sheet per record in the current set)
- *Mailing*—displays the current records as mailing labels (including name, organization and address). The resulting layout can be printed directly onto size 1” x 2 5/8” mailing labels (Avery #5160/8160).
- *Lists*—provides a menu of other quick list formats:
  - General Contacts: Contact name(s), business name, address, preferred phone, fax, email
  - Business directory: Active businesses categorized by business type, in 3-column format [only contact records marked as ‘business owner’ (‘business’ view) are included.]
  - Name/business: Contact name(s) and business name
  - Business/address: Business name and street address
  - Name/biz/add/phone: Contact name(s), business name, address, preferred phone
- *Reports*—standard reports: See ‘Reports’ section below.

In all lists and reports, selecting the  icon will switch the layout between portrait and landscape modes.

Reports

The report layout provides access to nine standard reports, each of which has appropriate “find” and “sort” criteria. These find and sorts can be changed to tailor reports as needed.

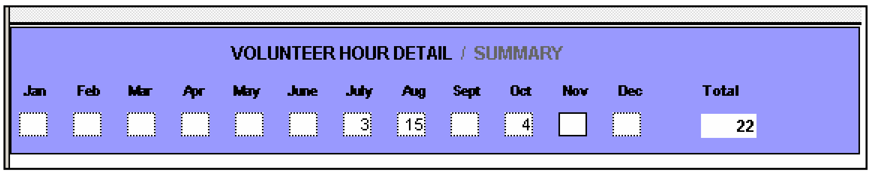
- Physical Improvements—Report of information on investments in façades, signs, public and private construction [information from ‘phys imp’ tab in contact record.]
- Property Sales—Report of last sale date and price information [information from parcel database]
- Biz Open/Close—Business status change report [information from business status boxes in ‘business’ tab of contact record.]
- Biz Changes Checklist—Checklist for actions taken when businesses open, move or close
- Vacancies—Report of vacant spaces, generated from contact records with the name ‘VACANT’ in the organization field
- Inventory of Square Feet—Business location listing with square footage information
- Retail Inventory—Detailed information on all locations marked as ‘retail space’
- Volunteer Hours—Volunteer hours detail report [including any contacts marked as ‘volunteer’]
- Total Volunteer Hours—Volunteer hours summary report [contacts marked as ‘volunteer’]

Common contact-related tasks

Tracking and Reporting Volunteer Hours

Volunteer hours can be tracked for anyone in the contact database using the following steps:

1. In the contact database find or scroll to the contact who has provided volunteer hours.
2. On the 'affiliation' tab, check the 'volunteer' box [located in the 'constituent' section]
3. Click on the 'volunteer hours' button.
4. Enter the number of volunteer hours for each month. The total hours for the year is automatically calculated.



To print a report of volunteer hours:

1. In the contacts database, select the 'reports' tab on the right side of the form. *Note that only contact records that have the 'volunteer' box checked (in the 'affiliation' tab) will be included in these reports.*
2. Select the 'Volunteer Hours' report to view the details separately for each volunteer. Select the 'Total Volunteer Hours' report to view volunteer hours for all volunteers at once. It is possible to switch between these reports by selecting 'summary' or 'detail' in the report header.
3. Hit the 'continue' button on the right side of the screen to close the summary report.

After these reports have been run, only volunteer contacts are included in the active set of records. Select 'Show all records' from the 'records' menu to view all records.

Finding and Exporting Contact Information for a Mail Merge

1. Identify the information that you want to export. Use 'find' to select these records.
2. Export data
   a. Select ("find") the contact records for export
   b. In the FileMaker 'File' menu, select 'Export records…'
   c. In the next dialog box, type the name and select the location for the export file. Choose the file type ('HTML Table File' format works well) from the 'Save as…' type list, then select **save**.
   d. In the 'Specify Field Order for Export' dialog box, indicate which fields you want FileMaker to export. If you do not know the field names for the items that you want to export, go into layout mode and double click on the field – a dialog box will appear that shows the field name.
   e. Click **export**.
3. Prepare the merge text in the program to be used for the merge (e.g. MS Word).
4. In the mail merge, use the exported file as the data source for the merge.

Common business-related tasks

Generating a simple business directory

The *Partners and Places Database* can produce a simple business directory of the active businesses in your Main Street district, categorized by business type, in 3-column format. All contact records marked as 'business owner' ('business' tab) are included in this standard report, which lists each business' name, address, work phone and web address, all grouped by the categories listed in the 'Directory Listing' field ('business' tab).

1. Identify the information that you want to collect and use in the directory. For all businesses to be included in the report, business information should be collected and entered for the following fields: Business name, Business address, Business phone ("work phone" field), Category of Business ("directory listing" field) and Business web site (used, not required).
2. Collect and/or update business information
   a) Identify (or create) a layout that contains all the fields that you want to collect.
   b) If you have information in the database that you want to update:
   select (find) those records in the database, then sort the records by street [CONTACT_ADDRESS1] and street number [CONTACT_STREETNUMBER] and print copies of those records for volunteers to update in the field.
   c) Print blank copies of the layout for recording businesses that are not currently in the database. To print a blank layout, select the 'Blank records, showing fields' option in the print dialog box.
3. Update the database with the information collected. *Note: the checkbox for the 'business owner' field* ***must be checked*** *for all records that are to be included in the business directory.*
4. Generate the 'Business Directory' from the 'lists' tab (right side of contact information screen) select the 'Reports' tab to the right of the contact information in any contact database layout, then select the 'Business Directory' button. [See also 'Faxes, Mailing Labels and Lists' above.]

New business opens

When a new business opens in business district, create a contact record, with business contact, location and category information (as a minimum), as noted below.

1. If a VACANT record exists in the database for the location of the new business, enter the information for the new business into that contact record. Otherwise, create a new record for the business.
2. Enter business name and contact information. Select the button to the right of the phone number to be used as the primary contact number.
3. *Business tab, 'status' section:* Select the 'new' box.
4. *Business tab, 'business' type section:*
   - Select the 'business owner' box (**very important**).
   - Enter the category to be used in the business directory ("Directory listing" field). If your program is tracking by NAICS code, enter this code ("NAICS code" field—description fills automatically).
5. *Business tab, 'business location' section:*
   - In the property database, find the record for the property where the business is located. Copy the value in the 'SSL' field (upper left) into the 'SSL' field for the new business.
   - Enter square footage and lease information (if known).
6. *Business tab, 'job tracking' section:* Enter the date the business opened.

Existing business closes

When a business closes within the district, click on the “Close Business” button on the Business tab. This will run a script, designed to help you keep a historical record of the business, but reflect the vacancy in your database and prepare the way for an eventual new tenant.

The close business script does the following things (which can be customized by editing the script):

- Creates a new VACANT record for the parcel, containing the address, parcel ID number, number of square feet, rent per square foot, link to the landlord’s info, and number of parking spaces.
- In the record for the closed business, the script removes the parcel ID, removes the business from any lists, zeroes out the employment data, and marks it as a closed business.

Existing business moves

When a business moves within the district:

- Update the address information for the contact
- Change the parcel ID on the business tab to reflect the new building

If the business moves to a new location outside of the district, it should be treated as a closed business.

Generating a report of business changes

The ‘Business Open/Close’ report lists business changes and related changes in the number of jobs in the district. To run the business changes report, select the ‘Reports’ tab to the right of the contact phone and fax fields (in the Contacts database), the select the ‘Biz Open/Close’ report button.

By default, this report will include only those businesses that are marked as ‘new’ businesses. Other reports—customized by type of change or for a date range—can also be generated using this form:

1. Run the ‘Biz Open/Close’ report
2. Select the ‘Cancel’ button to stop the standard script (located under the book icon on the left side)
3. Enter ‘find’ mode
4. Select the characteristics of the businesses to be included in the report. For example, to generate a report of new businesses that opened after September 30, 2004, select the ‘new’ box and enter ‘> 9/30/2004’ under ‘Date Opened’.
5. Select the ‘find’ button to show the records that match the characteristics entered.

Tracking vacant retail spaces and properties for sale

The *Partners and Places Database* can be used to track and report on vacant spaces and properties for sale in the District. To identify a retail space as vacant or for sale, add a new contact record and enter the following information. [If a vacancy is being caused by the closing of an existing business that is already in the database, instead use the “Close Business” tool, as described above.]

- Organization field: enter 'Vacant' or ‘For sale’
- Address field: enter the address of the vacant space or sale property
- 'Business location' field: the SSL of the parcel where the vacant space is located into the
- If appropriate, mark the record as a ‘retail space’ (see below) and record any other known details

Generating a report of vacant spaces

The Partners and Places database includes a standard report for listing vacant spaces. To run this report, choose the ‘Show vacancies’ button on the right side of the business tab in the contacts database. All business contact records with ‘Vacant’ in the ‘organization’ field are included in the ‘Vacancies’ report.

Note: The vacancies report automatically calculates a percentage vacancy rate for the district. For the **percentage** of total square footage info shown in this report to be a meaningful number square footage information must have been entered for all retail spaces in the district (vacant and occupied). Knowing the actual vacancies is much more important than the precise percentage of space in the district that is vacant, so identifying all vacant parcels should be a higher priority than gathering perfect information on square footage.

Generating a report of properties for sale

1. Run the vacancies report, as described above.
2. Enter 'find' mode
3. In the 'Vacancy' column, enter 'For Sale' and select the 'find' button

Retail inventory

The retail space inventory layout provides access to additional fields for tracking information related to the retail space where a business is located. To get to this layout, select the 'Reports' tab to the right of the contact information in any contact database layout, then select the 'Retail Inventory' button. [See also 'Reports' above.] A copy of the retail inventory form is included at the end of this section.

The retail inventory report first performs a find for any contact records that have the 'Retail Space' field selected. It is likely when you run the 'Retail Inventory' report for the first time that you will receive the message "No records match this request", in which case you should click the 'continue' button. If you have not previously identified a specific record as a 'retail space', the record that you are interested in updating will not be included in the found set. In either of these cases, enter 'find' mode and search for the business of interest. Once this business has been located, mark the record as a 'Retail space', so that the record will be included in future Retail Inventory reports.

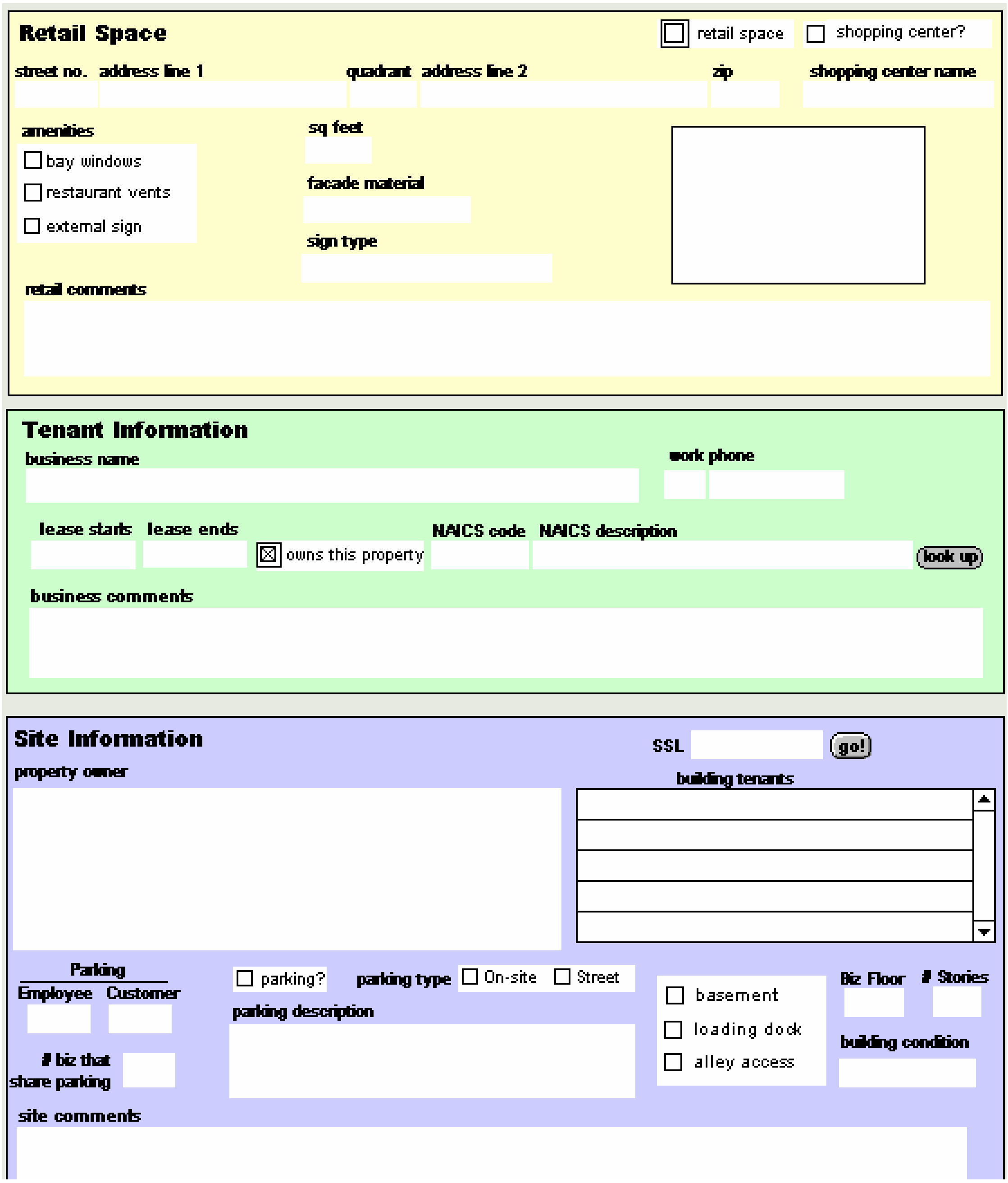
The following fields are included in the Retail Survey form:

- *Retail space*
  - *'Retail space' checkbox:* **should be selected for any business that occupies a retail space in the district**
  - *Address fields (street no, address, quad, zip):* information should already exist as part of the contact record
  - *Sq ft:* the size of the retail space
  - *Amenities:* indicate the existence of: bay windows, restaurant vents and/or external signs
  - *Façade material:* a selection list—brick, wood, dryvit, metal, other
  - *Sign type:* selection list with a variety of sign types
  - Other fields exist for shopping center information, comments and a picture

- *Tenant Information*—all of the fields in this section also appear in the 'business' tab of the contact database, so this information will likely already be filled in prior to generating the retail survey report.
  - *Business name*
  - *Work phone*
  - *Lease (start and end)*
  - *Owns this property (check box):* This is a non-modifiable field, which is automatically checked, if the business is linked as owner of the property where it is located.
  - *NAICS code and description:* Industry code for the business. The description is automatically provided, based on the NAICS code entered.
  - *Business comments:* Other information about the business

- *Site Information*
  - *SSL:* The SSL ('Square/Suffix/Lot') is the parcel ID code of business location. This is generally set through the 'Sync with contacts' tool in the parcel database. [For more information, see 'Link business records in Contact file with parcel records in Parcels file' in the next section.]
  - *Property owner, Building tenants:* These fields are automatically filled in, based on links that have already been established between the parcel and contacts as the owner or tenants of the parcel.
  - *Parking:* Fields exist for tracking 1) the existence and type (on-site or street) of parking available, 2) the number of parking sites available for employees and customers and 3) a description of the parking resources.
  - *Building amenities:* identify the availability on site of 1) a basement, 2) a loading dock and/or 3) alley access

- *Business location in the building:* document the floor and number of stories of the business location.
- *Building Condition:* Selection list: Excellent, Good, Fair, Poor
- *Site comments:* Other information on the site.Retail Inventory Form



Linking Contact and Parcel Records

The *Partners and Places Database* allows you to link contacts to parcels in your property database—either as property owners in a business district or as businesses/business owners in the district.

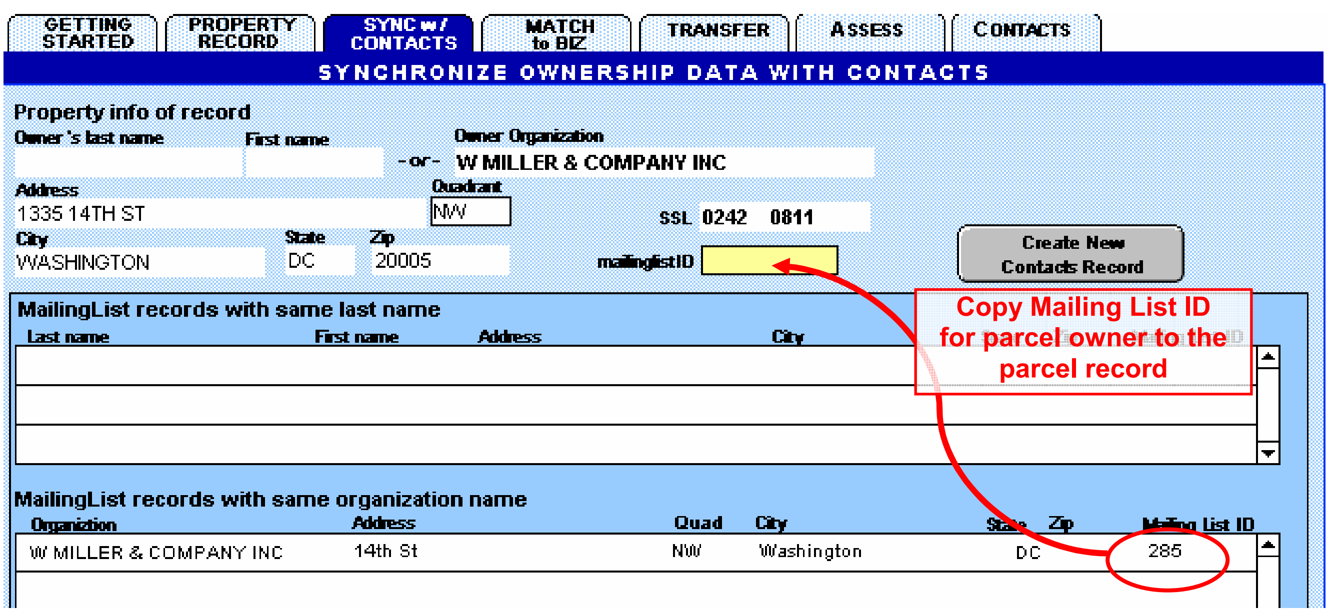
Note: One critical piece of information about a property is the city's record of who owns it, along with the address on record with the city for that owner. This data may or may not be current—indeed, one of the early tasks in launching a BID is to verify the ownership information one gets from the city, so that voting information and materials can go to the current owners. This database is set up to harvest and preserve the information one gets from the city without presuming it to be correct. City info is archived in the Parcels file, with other kinds of city information about the property. Current, verified information about property owners is kept in the Contacts file.

Parcel Owners: Link owner records (Contacts) with properties owned (Properties)

Once you have your contact information and property information loaded, you can start linking your contact data with the parcel data, using the "Sync w/ Contacts" tab in the Parcels file:

1. View the ownership information that you got from the city for each parcel, and compare it with Contacts records that have either the same last name or same organization name.
2. If you find a match, then type the MailingList ID from the matching record into the yellow MailingList ID field for that parcel above.
3. If you don't find a match, then you can easily create a new Contacts record for that contact by hitting the "Create New Contacts Record" button. It is also possible that a difference in spelling between the name of the owner/organization as entered in the contact and parcel databases. If a record for the parcel owner exists in the contact database but a match does not appear in the 'Sync w/ Contacts' screen, you can manually lookup the MailingListID for the contact (using a Find in the contact database) and enter the ID for that contact in the 'Sync w/ Contacts' screen.

- The property will be listed in the 'all properties by the same owner' section of the property record for the parcel.



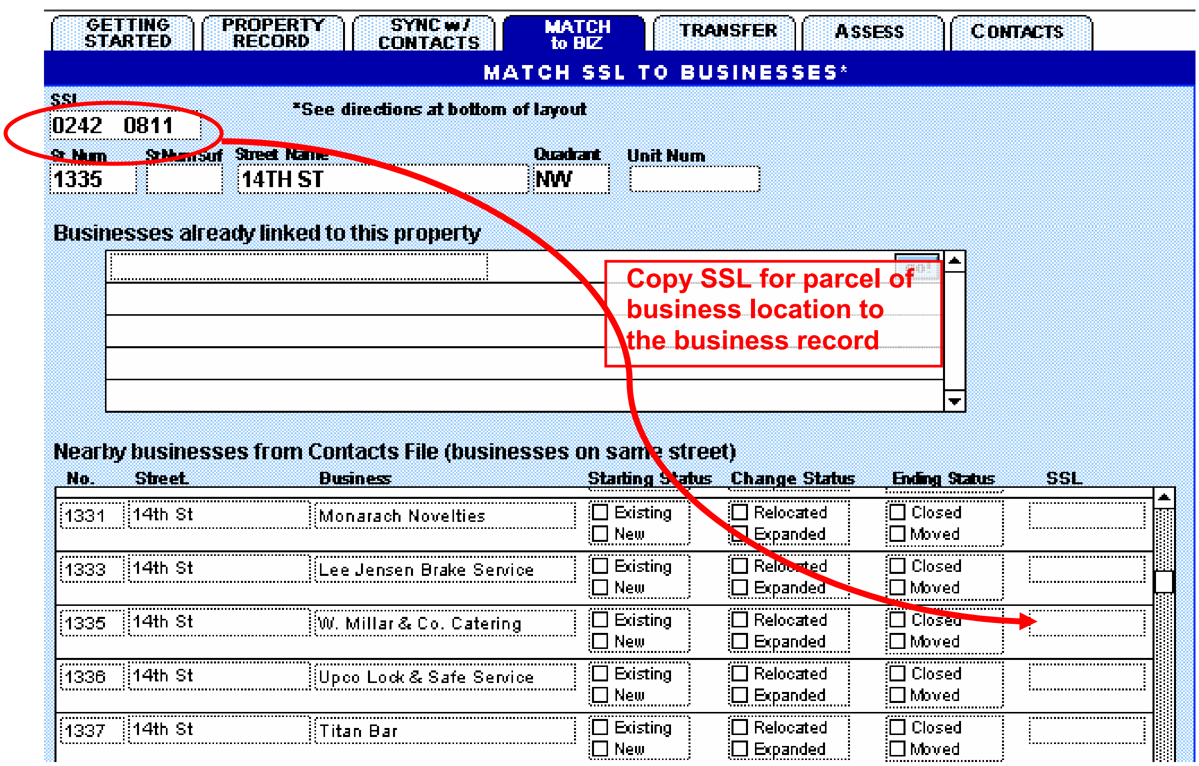
Once a link has been made between a parcel and the contact record for the owner of the parcel, this information is automatically reported in several other screens:

- In the contact record for the owner, the parcel is included in the list of properties owned by the contact. This list can be found in the 'properties' tab of the contact record.
- The contact is automatically marked as a 'property owner' in the 'affiliations' tab of the contact record.
- The contact is automatically entered as the 'landlord' for any businesses that are located in a parcel owned by the contact.

Business Location: Link business records (Contacts) with location (Properties)

It is useful to know which businesses are located in which parcels. Use the "Match to Businesses" tab to add parcel information to each of the business contacts.

1. Each parcel record has a unique parcel ID number (the SSL, which is listed at top of page)
2. Scan the businesses listed on that street from your Contacts file to identify businesses with the same address as the parcel, or with addresses that are included in the parcel. For example, a parcel located at "1-5 Main Street" would include businesses located at 1 Main St, 3 Main St, and 5 Main St.
3. When you find a business with a matching address, copy and paste the SSL from the top of the page into that business' contacts record, and the business will now be linked to the parcel.
4. Note: some businesses use a different address than the official parcel address—in particular businesses located on corners. For example, a business located on the corner of Main and Broad may use a Main St address, while the parcel is listed as #1 Broad St. Such exceptions must be looked up separately.

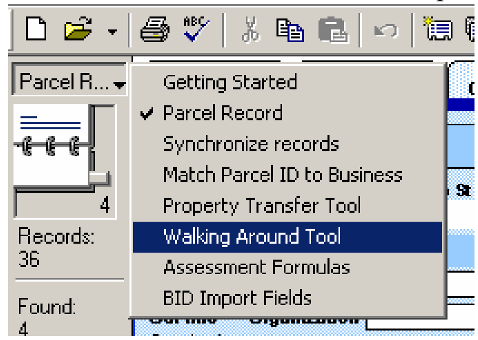


Once a link has been made between a business and the property where the business is located, this information is automatically reported in several other screens:

- In the contact record for the business, the parcel ID (SSL) for the business location is shown in the 'business location' section of the 'business' tab for the contact record. If a link has already been made between that parcel and the contact record for the owner of the parcel, the owner information is displayed in the 'landlord' section of this same tab.
- The business will be listed in the 'business tenants' section of the property record for the parcel in which the business is located.

Confirm parcel ownership information one gets from the city

Because city information is often a year or three out of date, you may need to reconfirm much of the ownership information you get from the city.



One way to do this is to subscribe to a Real Estate information service that tracks real estate parcels and sales histories from publicly available information, but in a more real-time manner than the government.

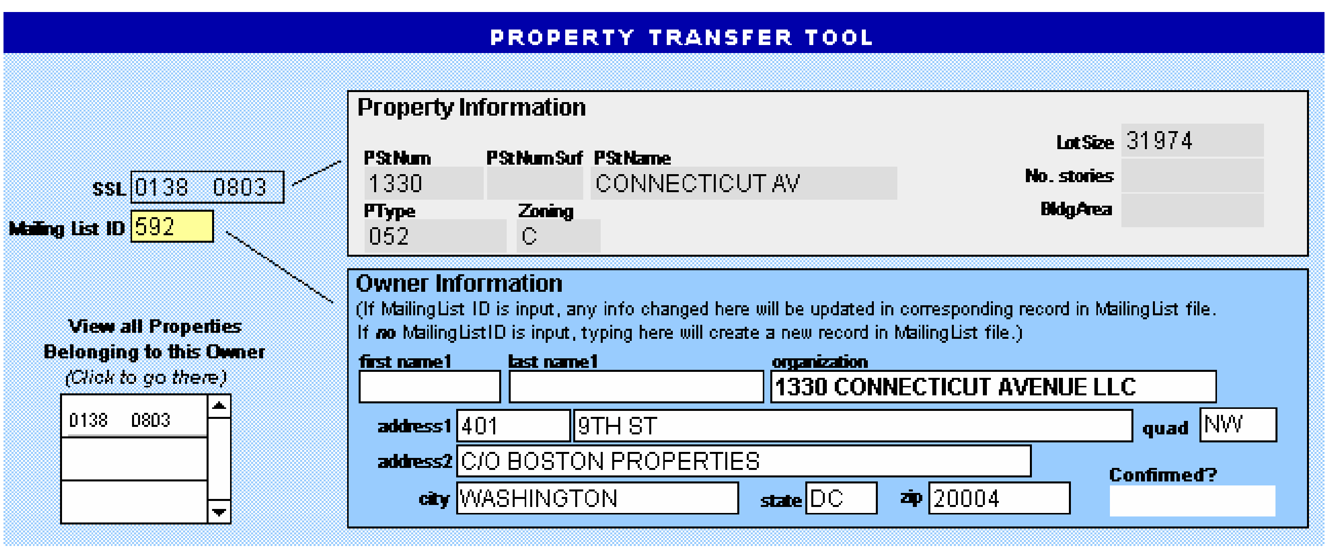
The other way is to actually walk around the district to confirm ownership information on some or all of the parcels. The Walking Around Tool layout displays the most current information in your databases, ready to be printed out and slipped into the clipboard of a volunteer. To display this report, select the 'Walking Around Tool' layout from the pop-up list, available just above the book icon in the upper left corner of the database screen (see image to the right—the pop-up list is displayed by clicking on 'Parcel R…' in this example.)

It is likely that you will identify parcels for which the District has an owner name listed that differs from the person/organization than you believe to be the current owner. In this case, the District's ownership information reflects the name that is on the deed for the property; this cannot be changed without a legal transfer of the deed. In such a case, it is the current 'owner' should be encouraged to investigate and correct the name on the deed to the property.

Change ownership information when a parcel is transferred to a new owner

When a property is sold or transferred to a different owner, use the Transfer tab to make the appropriate changes to both the Parcels file and the Contacts file from one page. To update the owner of a parcel:

1. Locate relevant parcel by Finding SSL of property that was sold
2. Remove the link between this parcel and its previous owner by deleting the MailingListID that appears in the yellow box. (The previous owner's record will remain in the Contacts file, but will no longer be linked to this parcel.)
3. Add a link to the new owner
   - If the new owner is already in your Contacts database (perhaps they own one of the businesses in the building, or own other parcels in the district) then type in the MailingListID of the new owner
   - If new owner is not yet in your Contacts, type the new owner's name into the "Owner Info" window. A Contacts record and MailingListID will be created and linked to the parcel.



Properties Database Tasks

Registering and reporting property sales

When a parcel is sold, the sale date, sale price and new owner should be recorded in the properties database.

1. If the new owner is not yet in the contact database, create a new record with contact information for the owner.
2. Link the owner contact record to the parcel by entering the Mailing List ID for the contact record into the corresponding field near the top right of the parcel record.
3. Enter the date and sale price into the 'parcel data' section of the parcel record.

To generate a report of property sales:

1. Run the 'property sales' report from the 'Reports' tab (in the Contact database).
2. Select the 'Cancel' button to stop the standard script (located under the book icon on the left side)
3. Enter 'find' mode.
4. Select the characteristics of the properties to be included in the report. For example, to generate a report of property sales after September 30, 2004 that were $250,000 or higher, enter '> 9/30/2004' under 'sales date' field and '>= 250000' under 'sales price'.
5. Select the 'find' button to show the records that match the characteristics entered.

Appendix A: Setting up the three databases

Contacts database

If your district is just starting up, or you haven't kept your contact information electronically before, you can just start inputting your data manually by creating a new record for each contact. The Input layout in the Contacts file is designed for easy data entry. However, if you already have contact information in another program (Outlook, Excel, Palm, Access, or practically any format) it is relatively straightforward to import your records into FileMaker. The Contacts database is built with one record per contact, and each record is assigned a unique identifying code called a "MailingList ID."

It is helpful to familiarize yourself with the fields in this database before importing the data, to get a good understanding of what fields you can import into. To view the fields, click around the different tabs within the layout, and/or browse around within File / Define Fields. You may need to define additional custom fields within Contacts to accommodate everything you track in your current contact database.

If your contacts are in Outlook or another database, export them from that program to Excel, dBase (dbf) or tab-delimited text format.

It is often helpful to open up the file you just created in a program like Excel before importing it into the FileMaker database. Some common things you might want to correct before importing include:

- Change data from ALL CAPS into Title Format
- Separate the area code and phone number into 2 separate fields
- Separate the Street Number and Street Name into 2 separate fields
- Make sure that City, Zip, and other such information are each in their own separate fields

When you're ready to import the data, go to the File menu and select "Import Records," then "File." Browse to select the file in which you saved the contact information, and then click OK. A window will appear in which all of the field names from your old data will be listed on the left side, and all of the field names from the FileMaker Contacts file will be listed on the right side. Select "Add new records" in the lower right corner of the page, and drag and drop the Contacts fields in the right hand window until they are lined up one-to-one with the matching fields to be imported. Once the fields are well-matched, then click to import the records. When you import your data, FileMaker will ask whether you want to perform auto-enter functions while importing—choose "yes" to have FileMaker assign a unique MailingList ID to each of your contacts.

Zoning database

The Zoning database is much simpler than the other two, but quite useful if you want to cut your parcel data by zoning codes. The District of Columbia has 109 different numeric use codes indicating specific uses (such as "063 Commercial-Parking Garage"). Setting up the zoning database allows one to see the text description for the numeric use code, which is helpful in understanding what a property is ("oh, it's a garage"). Also, it allows you to summarize the umpteen Land Use codes into 5 more basic categories—Commercial, Industrial, Mixed Residential/Commercial, Exempt, and Residential—that are easier to work with when sorting your parcels and determining assessment formulas.

Import city data into Parcels database

The Parcels database is built to have one record per parcel of land within the business district. The city can provide an electronic file with parcel information for the properties in your district. Each parcel will have a unique identifying code—the SSL ('Square-Suffix-Lot')—as well as information about the lot and any buildings on it, zoning, ownership information on record, and assessments. Import this file into the Parcel database.

You'll likely want to spend some time cleaning up the data once you've imported it. For instance, the city probably won't distinguish between an individual and an organization when reporting the property owner. For clarity and ease of linking building owner contact and parcel records, you may want to move names of individuals from the organization field into the first name/last name fields.

About this database

Allston Village Main Streets volunteer Paula Cobb (pcobb@mba2000.hbs.edu) and Executive Director Jennifer Rose (mainstreets@allstonvillage.com) designed and built this database. Two grants from Verizon Foundation helped underwrite the staff time involved. We hope it makes your work life easier and welcome any feedback. AVMS is located at 161 Harvard Avenue, Suite 11, Allston, MA 02134. Our phone number is (617) 254-7564.